

CAL GRANT EL VERIFICATION TRAINING

Question and Answer Transcript

Q. How do I draw out all of the new recipients from the main grant roster as a separate roster, using the customized roster function?

A. The easiest way to view only the student that need their EL verified is to create a custom roster format. Go the Customized Roster screen, create a new format and in the Define Selection Criteria section, check the following:

EL Status: "Not Paid, Verif. Required (2),"

 "Unable to Verify (5), and

 "Paid, Verification Required (6)."

New/Renewal: "New"

Section: "Eligible"

An example is included below. For further instructions on using the Customized Roster screen, please refer to the Roster/Reconciliation User Guide located on the HELP page of WebGrants.

EL (Education Level)	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5+
EL Status	<input type="checkbox"/> Verification Not Required (1)		<input checked="" type="checkbox"/> Not Paid, Verif Required (2)		
	<input type="checkbox"/> Verified As Reported (3)		<input type="checkbox"/> Verified with Change (4)		
	<input checked="" type="checkbox"/> Unable to Verify (5)		<input checked="" type="checkbox"/> Paid, Verification Required (6)		
New/Renewal Students	<input checked="" type="checkbox"/> New		<input type="checkbox"/> Renewal		
Program Code	<input type="checkbox"/> A	<input type="checkbox"/> B	<input type="checkbox"/> C	<input type="checkbox"/> T	
Section	<input checked="" type="checkbox"/> Eligible		<input type="checkbox"/> CC Reserve		<input type="checkbox"/> Ineligible

Note: to reduce the amount of payment data displayed when printing a report, select only one term to be included. Schools without a mandatory summer term can select the Summer Term only and view an EL Verification roster without any payment data.

Q. Is it true that California Community Colleges aren't required to verify the Education Level of Cal Grant Recipients?

A. Beginning with the 2003-04 award year, Community Colleges will not be receiving EL Verification rosters. Community college students will automatically be calculated at an EL 1 or 2, based on date of birth and their response to the "year in college question" on the FAFSA. This should reduce the number of corrections that community colleges need to make.

It remains good practice for Community Colleges to verify the EL of new Cal Grant recipients as part of the regular verification process so that students receive the correct amount of Cal Grant eligibility.

Q. Can a Cal C recipient who decided to continue for a Bachelor's Degree apply for Cal A or B? If yes, what will their EL be?

A. Yes. The EL would be based on the units completed.

Q. When will CSAC be mailing the EL verifications to the schools?

A. The paper EL Verification reports were mailed to schools the week of February 2. There is also a data file available for download in the Data Transfer / Report Download screen.

Q. How do I determine who needs to have EL verified from the online report?

A. Every student listed in the EL Verification data file requires verification. You can determine which students on your Display Roster screen require verification by looking at the EL Verification Status Code located on each new student's record:

1 – Verification Not Required

2 – *Not yet paid, verification required (this status requires verification)*

3 – Verified as reported

4 – Verified with change

5 – *Unable to verify (this status requires verification)*

6 – *Paid, verification required (this status requires verification)*

Q. Is there anywhere I can go to print out an outline of the presentation today?

A. A copy of the presentation is available on the Commission's website (www.csac.ca.gov) From the home page, click on Schools, Colleges, and Training. The training will also appear as an archived presentation on the www.cccconfer.org website within one week.

Q. Will we be notified when EL Verification needs to be done through the CSAC list-serve?

A. Schools will be notified each year when updates become allowable. It will be in early February of each year when we begin allowing school changes. As of right now you can already start verifying ELs for 2004-05.

Q. Since you are not sending any more paper EL Verification reports, when, during the school year, we should check WebGrants to see if there is are ELs to verify? How often or when we should we check to see if there is an EL roster out there for us to complete?

A. The roster will let you know which students need verification.

Q. Once we upload the modified EL Verification Report, does it get updated weekly or monthly?

A. The updates are weekly; however, new data files will only be produced monthly.

Q. Is there a deadline for reporting EL's for 2004-2005?

A. The EL has to be verified before the second term payment for the 2004-2005 award year can be reported.

Q. How do I get access to the EL fields on the roster?

A. Access to the EL Verification data is controlled by the School Administrator. Access can be granted either with or without access to the payment roster data. Security is tied in with the Roster/Reconciliation Main Menu.

Users with access to the payment roster should be granted access to EL Verification in addition

to their current access. When EL Verification access is added, the EL Verification fields will be included on the Display Roster screen. Fields have been added to the Customize Roster screen to allow users to filter the EL Verification data and view only students requiring verification.

Users without access to the payment roster should be granted access to the Roster/Reconciliation Main Menu, Customize Roster, EL Verification, and Print Roster. The EL Verification screen can be sorted and filtered by using the Customize Roster features.

There is also a data file available for download in the Data Transfer / Report Download screen.

Q. How will schools know if the uploaded EL Verification data file has been processed?

- A.** After uploading the EL Verification data file, users will see an instant “File Successfully Uploaded” message on the File Upload screen. The next day, users can go to the Report Download screen and view or download the EL Verification Upload summary report. This report lists the number of verifications successfully uploaded from the submitted EL data file, as well as the number and SSNs of the records that could not be successfully uploaded.

After the weekend processing users can go to the Report Download screen and view or download the EL Accept/Reject report. This report will list the student verifications that were accepted and process and those that could not be processes along with their corresponding reject reasons.

Q. If a student transfers from a CC to a 4-year institution, do we verify according to the amount of units transferred?

- A.** The school will certify an EL in the same manner for Cal Grant purposes as for other campus grade level or class level purposes. If the campus certified grade levels for the Federal Stafford or Direct loan programs the Cal Grant EL will be determined in the same manner. You verify based on the units you accept at your institution and your institutional policy.

Q. Can I correct a student’s education level even if the verification status code is “1 – Verification not required?”

- A.** Yes. WebGrants users can correct a new student’s EL on the payment roster at any time during the initial award year. Should a dispute arise in the future regarding the students entry level EL, the student will be instructed by the Commission to contact the original certifying school for correction. At that time the school can send a correction of the original EL (based on the EL at the time of first payment) to the Student Aid Commission on a Grant Record Change Form for Schools (G-21).

Q. Unable to Verify students will only appear if we report them that way, correct?

- A.** Yes

Q. What code would we use in the Verified EL dropdown box when the student has graduated and no longer eligible for an award?

- A.** If verifying the EL directly on the roster, select “Has BA degree” from the drop box. If verifying the EL through the data file upload process, use code “6-Has a B.A. degree.”

Q. Our System Administration has given us access to the EL Verification data, however, we do not see the fields for modifying EL Verification.

- A.** Make sure you are looking at new students. Only new Cal Grant recipients will have the EL Verification field available for update.

- Q. I only have standard CSAC roster selection, what do I need to do to get customized one?**
- A.** Have your System Administration give you access the “Customized Roster” page of WebGrants. For more information on customizing rosters, read the WebGrants Roster/Reconciliation user guide available for download from the WebGrants Help Page.
- Q. Can we process the 2003-2004 paper EL verification report we just received, online?**
- A.** Yes. You can complete the report manually and mail it back to the Commission as in the past, or you can complete the EL Verification online. 2003-2004 will be the final year that the Commission mails out paper EL Verification reports.
- Q. I didn’t receive the paper EL report as of yet, who do I need to contact to get one?**
- A.** Contact Grant Operations at 1-888-294-0153. You can also create a report by using the customize roster function. The reports may vary slightly as indicated in GOM 2004-02.
- Q. Are the files in the Type of Upload dropdown box the only types of files that can be uploaded? Can payments and Grant Changes be done through upload files?**
- A.** Yes. Payment files can be processed through a file upload, but, grant record changes have not been automated. Review the WebGrants Data Transfer user guide available for download from the WebGrants Help Page for more information on data file uploads.
- Q. My campus wants to automate our processes. Who at the Commission can we contact for assistance?**
- A.** Contact the CSAC Help Desk at 1-888-294-0148 if you would like to send us test files. The record layouts for creating data files can be located in the Help Center on WebGrants.
- Q. Does the text file require a header prior to uploading?**
- A.** Yes. The text file needs a header. If you use the Excel program, the program will create it for you. If you create your own text file, then you need to create a header record. The record layout specification for the EL Verification data file transfer has the requirements for the header and is available for download from the WebGrants Help page. You can also contact the CSAC technical help desk at 888-294-0148.
- Q. Will the EL Verification Accept/Reject report be sent to the school by email?**
- A.** No. The Accept/Reject report will be available for download from the Report Download page after the weekend processing.
- Q. Are there going to be paper EL Verification Accept/Reject reports?**
- A.** No.